



Electronic Plan Review Guide

This document provides general information on the how to apply for an electronic permit using ePermits and ePlans (ProjectDox).

Permit Process

USING EPERMITS- [HTTPS://EPERMITS2.LOGIS.ORG/](https://epermits2.logis.org/)

STEP 1: Register for ePermits account (one time only)

STEP 2: Apply for a Permit (For each project, address and space)

STEP 3: Pay Permit Application fee

USING EPLANS- [PLANREVIEW.SHAKOPEEMN.GOV/PROJECTDOX](http://planreview.shakopeemn.gov/projectdox)

STEP 4: Register for ePlans account (one time only)

STEP 5: Navigating ePlans

STEP 6: Upload plans via ePlans

STEP 7: Review and receive comments via ePlans

STEP 8: Uploading Prescreen Corrections to ePlans (if necessary)

STEP 9: Uploading Review Corrections to ePlans (if necessary)

STEP 10: Pay final fees when the plans are approved

STEP 11: Reviewing Markups

STEP 12: Approved Plans

Registration (ePermits & ePlans) and Permit Application

STEP 1: REGISTER FOR EPERMITS ACCOUNT

Before submitting a permit application, you must have an ePermits account.

NOTE: if you are a contractor new to the City of Shakopee, please call 952-233-9300 to have your business entered in to the database prior to applying for a permit.



1. Visit: ePermits2.LOGIS.org
2. Click on **Shakopee**
3. Click the **Account Link** on the right side of the screen.
4. Fill in the appropriate information. ****It is important that the email address is entered correctly****
5. Click **Create Account**

STEP 2: APPLYING FOR A PERMIT

NOTE: The maximum allowed amount that can be charged on a credit card is \$20,000.00. If you know that your permit application fee will exceed this, please contact the Building Division. Your permit review will not start until payment is received.

1. Once logged into ePermits, click on **Apply for Permit**.
2. Depending on the account type chosen at registration, you will see a list of permits that can be applied for. Choose the appropriate permit from the list.
3. Read and accept the declaration at the bottom on the page.
4. Enter the address of the property you are applying for.
5. Click **Next** and the address of the property will be validated. If an error occurs, please verify the address you entered and try again.
6. Enter in applicant information. This is the information that will be on the permit application and will continue in to ProjectDox should plan review be required. ****It is very important that the email address is entered correctly****
7. Click **Next**.
8. Enter a dollar amount into the **valuation for the permit**. This will calculate the permit application fee. Click **Next**.

STEP 3: PAY PERMIT APPLICATION FEE


9. The fee page will now show the total permit application fees as defined for the permit being applied for. Read the provided ****Note** and click **add to cart**.
10. Click **Check out with PayPal button** or click **Continue Shopping** if you have more permits to apply for so all fees can be paid at once.
11. Enter credit card information and click **Continue**.
12. Fill in your credit card information to complete the payment transaction. Click **Authorize this Transaction**.
13. An Order Summary will be displayed. Print or save for your records. An email receipt will be sent to the address used for the permit application.



14. If plan review is required, you will also receive an email invitation from ePlans to upload plans and documents. **This email can take 2-3 minutes before you will receive it. **

STEP 4: REGISTER FOR EPLANS ACCOUNT

When the permit application has been submitted and application fee is paid, an invitation email (see below) will be sent to the user to upload plans. A temporary password will be included in the new user email.



Hello [Applicant],

Welcome to City of Shakopee's electronic plan review process. This Project invitation has been sent to you in response to your permit application. An EPR (Electronic Plan Review) has been created to allow you to electronically upload your drawings, documents for permit plan review.

NOTE: If this is your first time using the ProjectDox application, disable your pop-up blocker. In you are an Internet Explorer user, on the login page, click on the "Install ProjectDox Components" link; this will install the Active X components on your computer which are necessary for the application to function properly.

To access your new Electronic Plan Review project, follow the instructions below:

1. **Very Important!** – Please review the [\[link for EPR APPLICANT USER HELP\]](#) in its entirety before starting the process. Failure to follow the appropriate submittal guidelines may result in delay or rejection of your permit!
2. Click the project access link [\[link for ProjectDox EPR site\]](#)
3. Enter your login (email address) and temporary password provided in this email
4. Set up your permanent login account for secured access to the system
5. Click on the Project link on the "Active Projects" page
6. Click the "Drawings" Folder.
7. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see [\[EPR APPLICANT USER HELP\]](#)).
8. Click the "Documents" Folder.
9. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see [\[EPR APPLICANT USER HELP\]](#)).

TO COMPLETE YOUR SUBMISSION TO THE CITY YOU MUST PERFORM THE BELOW STEPS

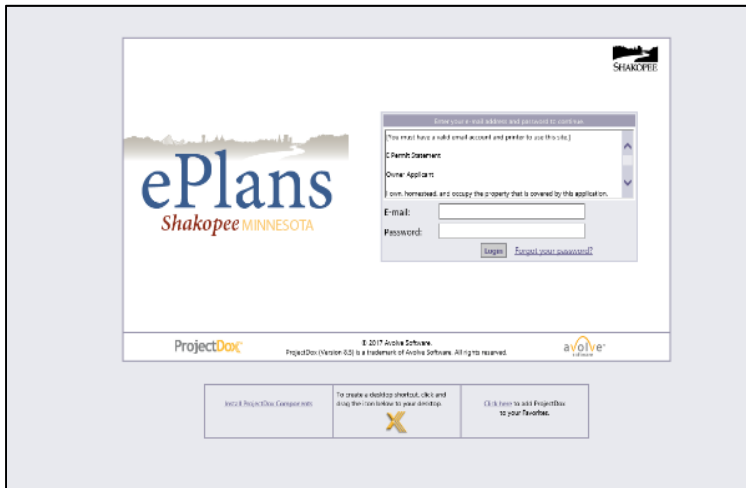
10. Once all plans/documents have been uploaded to the appropriate folder(s) while inside the project click on the "Workflow Portals" button.
11. Click the "ApplicantUpload" link under the task column.
12. Click "Ok" to accept the task.
13. An electronic form will display. Click on the "Upload Complete- Notify the City of Shakopee" button to complete the submission of your plans and documents to the City of Shakopee.

Supported file types: DWF, PDF

User Login:	Joe.customer@somewhere.com
Temporary Password	BFGH56R
Project Permit Number:	2015-0000101
<HelpDesk Email>	epplans@shakopeemn.gov
Project Permit Access Link	



Logging in & Creating a User Profile



From the invitation, click on the link **Login to ProjectDox**. This will open a web browser and take you directly to the login screen. You can also open a web browser and type in the City of Shakopee's ProjectDox URL:

PlanReview.ShakopeeMN.gov/projectdox

Type or paste the temporary Password Field and click **Login**. The password is case sensitive.

Change Password:		Password Reset Question & Answer:	
New password: *	<input type="text"/>	Security question: *	<input type="text"/>
Confirm new password: *	<input type="text"/>	Security answer: *	<input type="text"/>

Password must not contain special characters, must contain at least one digit and one alphabetic character

Profile Information

Contact Information	User Metadata	Project Membership	Group Membership
Save			
* Required field			
First Name: *	Jesse	Last Name: *	Meyer-Ruud
Email: *	JMeyerRuud@EdinaMN.gov		<input checked="" type="checkbox"/> HTML format i
Title:	<input type="text"/>		
Company:	<input type="text"/>		
Address 1:	<input type="text"/>		
Address 2:	<input type="text"/>		
City:	<input type="text"/>		
State/Province:	<input type="text"/>	Postal Code:	<input type="text"/>
Phone:	<input type="text"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Pager:	<input type="text"/>
Stamps:	<input type="text"/> i		
Language: *	en	<input type="text"/>	

You will be taken to your User Profile; you will need to:

- Reset your password
- Create a security question and answer
- Enter some additional information about yourself/company

Fill in all the fields and click **Save**.

You can return to this screen at any time by clicking on the **Profile** button on the Main Toolbar.



ePlans Home Page

STEP 5: NAVIGATING EPLANS

After saving your profile information, you will be taken to the Home Page (shown below) where your list of Active Projects will display. If using ProjectDox workflow you have a task assigned to you it will appear in the Active Task List below the Projects Table.

If you ever forget your password, click on the **Forgot Your Password?**

The screenshot shows the ePlans Home Page. At the top, there is a navigation bar with buttons for Back, Forward, Projects, Profile, a search icon, and Logout. Below this is the 'Active Projects List' section, which displays a table of projects. The table has columns for Project, Options, Description, Owner, Status, and Create date. Below the projects table is the 'Project/Task List' section, which displays a table of tasks. The table has columns for Task, Project, Instance, Group, Assignment Type, Status, Priority, Due Date, and Created. The first task listed is 'Batch Status Task Resubmitted from Review' with a status of 'Pending' and a priority of 'Medium'.

Project	Options	Description	Owner	Status	Create date
Shakopee Project Documentations		Shared space for Shakopee Project documentation	Frank Schatzman	Pending	9/22/2016 3:47:42 PM
24006416		Building Basement Finish	Chadwick Lakso	Approved	1/13/2017 1:55:55 PM
19086414		Building Basement Finish	Chadwick Lakso	Approved	1/13/2017 4:16:39 AM
Revised for Change of Ownership		Somers Family Center	Mark Bandy	Applicant Upload	1/13/2017 1:00:19 PM
Test		Test	Gus Day	Pending	1/13/2017 12:24:48 PM

Task	Project	Instance	Group	Assignment Type	Status	Priority	Due Date	Created
Batch Status Task Resubmitted from Review	24006416	24006416 - Building Project Template - 1/13/2017 1:55:55 PM	Permit Coordinator	PermitGroup	Pending	Medium		1/13/2017 2:23:53 PM

Home Page Toolbar

This group of buttons provides your primary navigation functions. This toolbar is located in the top-right corner of your Home Page.





Button Guide

- The **Back** and **Forward** buttons function much like the back and forward buttons on an Internet Explorer page, taking you to the screen you previously or subsequently viewed.
- The **Projects** button will take you back to the home page where your list of active projects and tasks will display.
- The **Profile** button will take you to your User Profile, where you can edit your personal information and change your password.
- The **Reload** button will refresh the current page you are on.
- The **Search** button allows you to search for a project based on the key information entered into the Project Info Page, or it allows you to search for a project.
- The **Help** button takes you to the ProjectDox Help Site. Use the index or search functions to find instructions on specific aspects of ProjectDox.
- The **Logout** button logs you out of ProjectDox.
- The **Task List** button shows any tasks requiring action from you for all your projects in a separate page.



- The “Recent Projects” button will show the 15 most recently accessed projects with the most recent projects accessed always displayed at the top.
- To view all your projects, click on the “All Projects” button.
- Project Search Field feature is a partial word search and will provide results that contain the words entered into the Search Field for any of the columns: Projects, Description, Owner, and Status.
- The Active Projects List provides you with basic information about every project to which you are assigned and is sorted by Project (Permit Number). You can sort your project’s main page.
- Hovering over a Project Name displays the date when the project was created.
- The Project List and the Task List are set to display a limited number of entries at a time. Use these buttons to move to the previous, next, first, or last page.

File Types and Borders

File Types:

1. DWG and PDF files are accepted when uploading drawings. DWG files are preferred.



2. Searchable PDF files are accepted for calculations, reports and other supporting documentation (non-drawing files).

File Standards

The City of Shakopee requires that plans be uploaded in an approved format, to scale, with output dimensions of the following sheet sizes:

8 ½" x 11"	11" x 17"
24" x 36"	30" x 42"

File Naming

Plan file names and sort order **must** match the sheet index. ProjectDox sorts numeric then alphabetically. File names for drawings submitted for electronic plan review should include the discipline character, followed by the three-digit sheet number. If decimals are needed in the sheet number place it after the third digit. Ex. S.001.00

NOTE: When uploading a corrected file, the file name has to be uploaded as the original file name in order to see the corrections.

Drawing Type	Discipline	Example
Fire Alarm	FA	FA.008
Architectural	A	A.100
Civil	C	C.007
Demo	D	D.000
Electrical	E	E.004
Equipment	Q	Q.003
Fire Protection	FP	FP.004
General	G	G.009
Geotechnical	B	B.010
Haz-Mat	H	H.005
HVAC (Mechanical)	M	M.003
Interior	I	I.009
Landscape	L	L.008
Plumbing	P	P.005.99
Structural	S	S.002
Survey	V	V.006
Telecommunications	T	K.006

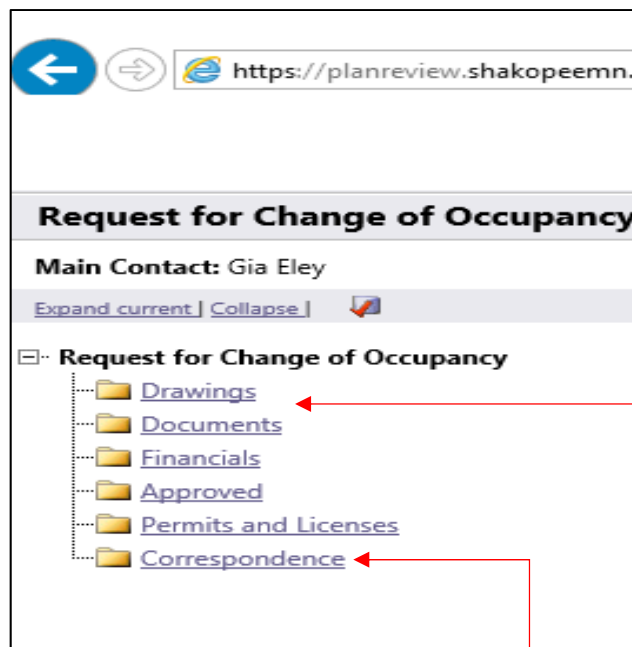


ePlans

STEP 6: UPLOADING PLANS VIA EPLANS

After you have successfully logged into ProjectDox, the projects screen will display. Any project for which you have access will display in the list. Any outstanding tasks that require your action are displayed in the **Active Task List** area below the project list.

From the Active Task List area click on the **Permit Number/Project** for which there is an Applicant Upload task. This will open that Permit/Project's main screen. Click on the **Workflow Portals** button. The Applicant Upload task will display. Click on the task name and a dialog box displays, *Do you want to accept this task?* Select **OK** to accept responsibility for completing the task. The eForm window will appear.



1. Back on the Project Page, click on the Drawings or Documents folder depending on the file you are uploading. (see image to the left).

NOTE: Drawings folder is used to upload site plans, surveys, architectural drawings, structural drawings, etc.

Documents folder is where the permit application specific to your project is uploaded. To find the appropriate permit application go to:

<http://www.shakopeemn.gov/city-government/departments/building-inspections>

Correspondence folder is used for the reviewers and applicants to upload relative documents anytime during the review cycle.




No files currently exist in **Drawings**.

To upload files into this folder
(1) Click the Upload button below
(2) Follow the instructions in the pop-up window

Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.

[View Folders](#) [Upload Files](#)

2. Click the **Upload Files** button (next to View Folders) NOTE: You may need to press the Refresh button if you do not see the button.

 **ePlans** [Close Window](#)

Upload Files **Upload URL**

Browse For Files [Browse For Files](#) [Upload Files](#)

Browse for files or drag files into this area.

3. The **Upload Files** dialog will appear.
4. Click on **Browse for Files**.
5. Then navigate to and select the file you would like to upload from your computer.

NOTE: The file name is limited to 70 characters.



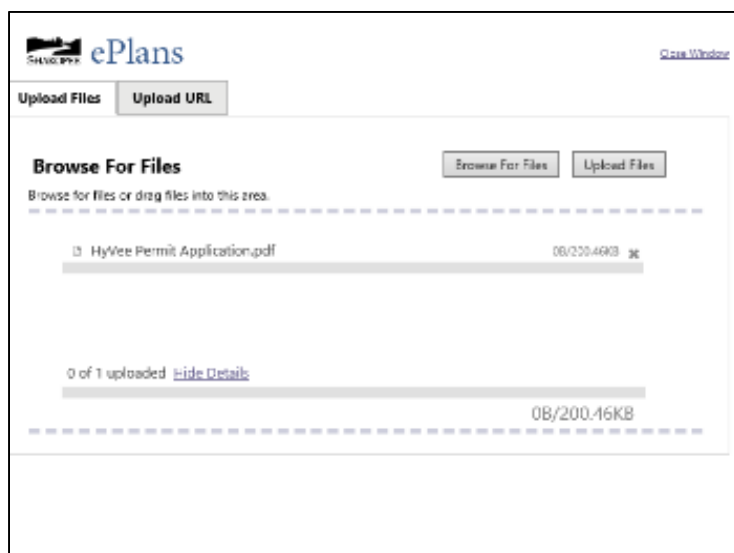
6. Once you have the files selected they will appear in the Upload Files page and click **Upload Files**.

7. Another page will appear and it will display which files have been uploaded. Click **Close**.

8. Once the files are uploaded to the folder(s), thumbnail images of all the files will be visible on the right hand side of the screen. Under each thumbnail, you can see the filename, upload date and time, file size information, and name of the user who uploaded that file.

9. When finished with uploading all the files, go back to and click on **Workflow Portals** box in the upper right hand corner of the page.

10. At the bottom of the page under **Workflow Instances**, there is an **Applicant Upload Task** that you can click on and a new screen will appear.





Secure | https://planreview.shakopeemn.gov/ProjectDocWebUI/WorkflowForms/Form.aspx?wflowTaskID=774

Review Information	Permit Information	Contractor Information	Fees and Payments Information	Global File Compare
<p>Project Name: SH086464 Project Description: Building Basement Finish Coordinator: Gia Eloy Review Cycle: 0 Workflow/Activity Name: Shakopee Building Workflow/Applicant Upload Current User Login: Gia Fley (GFley@ShakopeeMN.gov)</p>				

Task Instructions
After you have successfully uploaded all required plans and documents, please click the (Upload Complete) button.

11. Check the box at the bottom of the screen that states, *"I have uploaded all required drawings and/or documents."*

12. Click **Upload Complete**. This will complete the Applicant upload task and it will notify The City of Shakopee that it is ready for review.

The Prescreen Review step is used to review the uploaded documentation in the project prior to assigning the review to the departments. City of Shakopee staff will review the uploaded files. When no additional information or corrections are required from you, the submittal is ready to be routed to the departments for formal review process. Once the prescreen review is approved by the permit coordinator, specific departments that need to be included in the review will be assigned.

If items are missing or corrections are required from you before formal review can begin, a **Prescreen Rejected** email will be sent to you with instructions on how to resubmit to fix the issues. City of Shakopee staff will provide information about the submittal issues and also attach supporting documents for you to review.

STEP 7: REVIEW AND RECEIVE COMMENTS VIA EPLANS



SAMPLE REVIEW CORRECTIONS EMAIL

Prescreen Corrections Reminder Task Assignment

Attention [UserFirstName]:

This is a courtesy reminder that your plan submittal review for Project: **SH0000000 (Example)** does not meet the requirements for the plan review submittal. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and or documents are ready for re-submittal, please, [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to avoid your Permit Application from expiring.



Project:	SH000000
Task:	ApplicantResubmit
Assigned by:	PermitCoordintor
Project Access Login to ProjectDox	

If you do not have access to the specified folder, please contact the [Project Administrator](#).

Please do not reply to this email.



Prescreen Corrections or Review Corrections

STEP 8: UPLOADING PRESCREEN CORRECTIONS

If you receive a prescreen rejected email, this means the permit coordinator is missing information before the formal plan review is started. Once the missing information is received, the formal review cycle will start.

Follow these steps below to complete this task:

1. Click **Login to ProjectDox** link from your email.
2. Click **Prescreen Corrections Task**.
3. Click **OK** to the dialog message, *Do you want to accept this task?*
4. Review the comments (if provided) in the text box.
5. Review the items in the checklist by selecting either the **View Intake checklist** link or the **Checklist Report** tab.
6. Revised documents need to be uploaded using the same name as the original file to allow for automated versioning of the file.
7. Select the check box to indicate corrected items/documents have been uploaded.
8. Add a comment (if necessary).
9. Click **Corrections Complete** button.
10. Click **OK** to the dialog message, *Completing this task will finish your participation in this step and cannot be undone. Continue?*
11. By clicking ok, an email notification will be sent to the permit coordinator to perform the prescreen review again.

STEP 9: UPLOADING REVIEW CORRECTIONS

If **Corrections Required** was selected during the department review, you will receive an email notification of the resubmit task assigned to you and a task added to your task list.

Follow these steps below to complete this task:

1. Log in to ePlans
2. Click **Applicant Resubmit** from the task list.
3. A dialog box displays, *Do you want to accept this task?* Click **OK**.
4. Review the following items:



- a. Comments provided by the plan reviewers and provide responses (if necessary).
 - b. View **Checklist Items** on the checklist tab.
 - c. Markups provided in the changemark sections.
5. Make required corrections and upload the revised files to the same folders as using the same naming convention as the original file.
6. In the task instructions section, select the check boxes.
7. Selection of all 3 boxes enables the **Review Complete** button.
8. Click **Review Complete**.
9. Click **OK** to the dialog message to complete the task.

An email notification will be sent to the permit coordinator. They will confirm that the plans have been uploaded and the proper departments are selected for the next review cycle. If any department rejects the review, **Applicant Resubmit** step will repeat until all departments approve.

STEP 10: PAY FOR FINAL FEES


When all reviewers approve the plans, the permit coordinator applies the City of Shakopee approval stamp which is located on the top right corner of the approved plans. You will receive an email to pay final fees through ePermits.

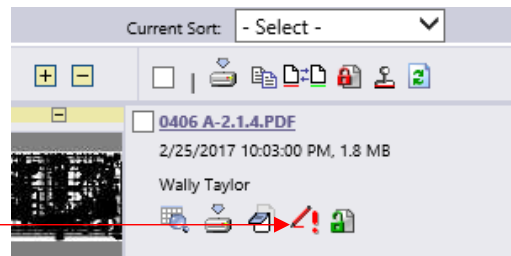
- Click **Login to EPermits** in the approval email.
- Once logged in, click **Pay for Approved Plan Review Permit** and you will see the amount due for the permit. If you cannot see, you will need to search the permit by the permit number and add to cart.
- If the amount exceeds your credit limit or \$20,000, you will need to pay in person.
- If you do pay with a credit card, you may log into ePlans and download the approved plans in the **Approved Folder**. Be sure to also check the **Correspondence** folder for other associated documents.
- Once the fees are paid, the permit will be issued.
- If paid via ePermits, a PDF of the permit card and required inspections can be downloaded and printed.
- If paying in person at the City of Shakopee Building Department, you will be given a paper copy of the permit card and required inspections.

STEP 11: VIEWING MARKUPS

NOTE: REDLINES/MARKUPS DO NOT SHOW ON APPROVED STAMPED PLANS.




It is important to review all documents in the drawings, documents, financials, approved, permits & licenses, and correspondence folders for a red explanation point. This red explanation point indicates there is a comment/markup on that drawing that needs to be reviewed by the applicant. This is a very important step. 



STEP 12: APPROVED PLAN SET

After final payment is made, you can now download the approved plans from ePlans.

1. Login to ePlans.
2. Click on the **Approved** folder.
3. Click the checkbox to select the document to download.
4. Click on the download icon. 
5. A new screen will appear with the approved stamped plans



****A SCALE SET OF APPROVED PLANS AND INSPECTION RECORD IS REQUIRED TO BE ON THE JOBSITE****

Have additional questions or comments? Please contact Gia Eley, Permit Coordinator
geley@shakopeemn.gov or 952-233-9322 or the Building Department 952-233-9397.